WSDOT/ACEC Project Delivery Team Meeting
Lakewood Maintenance Facility, Tacoma, Washington
April 1, 2005
Website: http://www.wsdot.wa.gov/partners/projectdelivery/

Attendees
Ken Smith - Team Co-Chair
Duncan Findlay - Team Co-Chair
Kirk Berg
Doyle Dilley (absent
Richard (Rick) Door (absent)
Russ East (absent)
Mary Holland
Mike Horton (absent)
Ron Landon
Mike Mariano (absent)
Keith Metcalf
Keith Nakano (substitute for Karl Winterstein)
Amir Rasaie (absent)
Lisa Reid
Rick Smith (absent)
John Villager
Karl Winterstein (absent)
Adele McCormick - Recorder

Guests:
Darlene Sharar, Access Point Decision Report (APDR)
Patty Mutton
Jamie Selby

Introductions and Agenda Review
Ken Smith

Discussion on Developing Project Managers
Duncan Findlay

Don Nelson is driving this initiative.

Duncan read through the JLARC overview. Of the 23 recommendations in the JLARC
report, none focused specifically on project managers or developing project managers.
What do we think WSDOT wants to address? Culture, selection, observation, training?

Don's expectation is to find out if there is something the consultant arena is doing to
develop project managers. What are they doing to ensure they grow their people within
their organizations into project managers? They want project managers who are actively

controlling the overall schedule, including input from environmental, etc. So they are shepherding the project. How do the consultant organizations mold their people to have the skill set to do this?

WSDOT is modifying what they are doing to prepare project managers and they want to be sure they are in line with what the consultants are doing.

Decision-making ability is different. Karl can make 95% of the necessary decisions for Parsons Brinckerhoff. However, his WSDOT counterpart has to go to his/her supervisor and on up the line through several people. Karl doesn't make the decisions in a vacuum either, but he doesn't have to jump through as many hoops. Ultimately, the final decision is Karl's. His counterpart was not empowered to the same degree.

WSDOT's process for developing and training project managers is very successful. People work their way up through the ranks. Working as an assistant grooms project managers. Consultants may have a specific project management program, training, etc. The difference is that if a person is brought up, trained, and given a chance to be a project manager, either they will eventually be a successful, strong project manager, or they won't. Those who don't make the grade are given supporting roles. At WSDOT, once you have made it to project manager, you won't be relegated to a supporting role.

HNTB has several tracks to follow - project management, technical, contracts, etc. By the time you are a PE with 2 or 3 years of experience, you start tracking into one or more of these areas. It appears to be more fluid. If someone has an ability to lead, they are moved into that opportunity.

This is true with a number of consultants. If you aren't manager material, but are proficient in another area, that is the track you are able to follow. Some technical experts don't want to manage.

Duncan had his people take a personality test. The personality type that seemed to be identified with managing was the shepherd. Some of the best managers were in the center rather than being strong in just one area.

There are some people you want to reward and bring into the management ranks because they are good and at the top of the technical classification. But they may not be management material, so you have to find some other way.

It isn't all about the training. There is a need to focus on the individuals.

CH2M Hill has several career paths. Engineers start in technical. They have career development frameworks. They have core competencies. As they move up, they are assessed on their competencies and decide which they need to work on. CH2M Hill calls it emotional intelligence – the emotional IQ needed to succeed. The people who have the ability to work with all the people are the ones who will succeed. At each level there is the expectation that you will meet a certain number of the competencies. Some may not

want to be project managers, but they may want to be a design manager – they decide what skills they need to build to move into what they want to achieve.   You don't become a project manager until it is approved. The senior project managers have to be PMI certified.

There are different levels of management. Someone may not be a project manager, but they may be managing a piece of the project.

Project managers are often mentored through the process. WSDOT does this with assistant PEs.

Career tracks
What is the mechanism to identify if a person is suitable for this career path?
Is there some way of measuring and testing? This happens every day on the job.
There is no actual testing – it's assessment of performance.

	CH2M Hill	HDR	HNTB	PB	Shannon Wilson	PSI	WSDOT
PE (Yes if engineering project)	Desirable, but quality manager has to be a PE	Y/N	Y	Y/N	Y	N	Y
PMP	Y (most senior level PMI) Internal certification	N	N	N	N	N	N
In-house training	Y	Y	Y	Y	Y	Y	Y
Performance measures that may redirect career	Y	Y	Y	Y	Y	Y	N (yes at times)
Internal project management certification	Y	N	Y	Y	N	Y	N

Sometimes at WSDOT there is a lack of clear role definition. People are unclear about what level of authority they have, what kinds of decisions they can make, etc. This isn't the way it is everywhere across WSDOT.

Skill sets project managers should have:
- Communications
- Planning
- Interpersonal skills
- Technical skills
- Business sense (financial)
- Leadership
- Administrative skills

WSDOT is more technically aligned; consultants are more project aligned.

Project Management On-Line Guide Update
Ken Smith

Demo of on-line guide.

This is password protected right now until we feel it is completed. Later this summer, it will be available on-line to everyone.

WSDOT needs to decide how this will be tracked and who is responsible for what part in the contract and payment arena.

As we get into managing scope, schedule, and budget, we should consider how the consultants fit into this.

The consultant's job is to understand what WSDOT's requirements are, but they aren't included.

Master Deliverables List (MDL) Improvement Opportunities
Patty Mutton/Jamie Selby/Ken Smith
Handout: PDIS What you need to know about the MDL

Overview of the MDL; how it is structured; how we are using it in WSDOT.

Handout: Website page
WSDOT Project Management website:
http://www.wsdot.wa.gov/Projects/ProjectMgmt/

The MDL can be downloaded in Excel if you aren't using PS8. If you are using it for a project, you need to have a PS8 license. WSDOT will install a network card in your computer and then take it out at the end of the project. Some consultants have an account on their own computer to access WSDOT.

Handout: Project Delivery Training Flow Chart

Comments:
- The MDL doesn't fit workflow well because it is designed by discipline. It isn't process oriented and it can be really cumbersome trying to track it that way.
- It's a good tool.
- We don't want to resource load it because some of that is private and others can look at it.
- Have to have two copies and keep both updated.
- It would be good to use as a bigger tool, but it is a WSDOT tool, not a WSDOT consultant tool.
- It is creating a lot of work for consultants that doesn't benefit the consultants.
- PS8 is not a standard tool in some companies.
- Can't use it unless you keep a second copy for the consultant.
- The system kicks them off and then they have to call to get logged off before you can log in again.
- Can't work on it on weekends when no IT people are at WSDOT to help.
- The MDL has project numbers; somewhere they were changed by 10, so now some scopes don't match. These are the task numbers. It gets confusing to link up WBS codes to what the consultant is doing. It is a big management issue. The task numbers don't match MDL numbers. There are some glitches that make it hard to track.
- Pre-scoping piece – add PDIS development in this piece (scope of work).
- Good program – not user friendly.
- We don't want to go down to an 8-hour task to manage.
- It would be nice to be able to import and export (consultants).

The On-line guide will eventually be available through this website and the guide will link to the MDL.

WSDOT is looking for modifications to the MDL. They are exploring removing MDL from PS8 and making it a stand-alone tool. More like TurboTax's interview. Then it would automatically generate the schedule.

Action Item: Ken will bring issues from consultants to the steering committee. Let him know your frustrations.

Action Item: Jamie Selby will contact Lisa Reid about how the system works for her and Lisa's frustrations with it.

Lessons Learned from Process Reviews
Keith Metcalf/Ken Smith
Handout: Region peer reviews of Design Documentation Packages

We are conducting inter-region process reviews with the expectation of finding items that are in the design documentation packages that don't need to be there.

Design documentation packages were turning back into design reports with more information than necessary. Some of this should be in the design file (or somewhere else), but doesn't need to be in the DD package. It includes things that need to be done, but aren't part of this. It was hard to track whether this was delaying the project or not.

The Design Documentation Checklist keeps growing and growing. A lot of it really needs to be in the project file, not the design documentation package.

The tool is being utilized differently from region to region. Some regions see it as a requirement instead of a tool

Suggestions:
- Have a gatekeeper that all additions to the list must go through.
- Follow the *Design Manual*.
- Reviewers should let regions know what doesn't belong.

Action Item: Ken will put a group together to review differences between the 16- and 36-page checklists.

The original purpose was to help the designer wade through the *Design Manual* to decide what they really need to do.

Action Item: Draft Recommendation
Ken will be responsible to draft a request to require WSDOT to review the checklist and revisit the requirements of design documentation. What is the appropriate mechanism to keep it from creeping into something bigger again? Make sure the purpose of the tool is understood.

Design concurrence or geometric approval – how can we strengthen what is out there today so we can do what it means?

Review Progress and Tracking Results
Team
Handout: Tracking sheet of this team's recommendations

Assumed a $10 M improvement project.

There was a suggestion to use units of time instead of percent.

The team discussed revisions to the chart.

Should we revise Recommendation 3 to include money for lease payment? This money currently comes back into the Department, but it doesn't go back into the project. The stakeholders were all for this recommendation, but feel leases should be included. All comments were good – none thought it was bad.

Action Item: Keith Metcalf will revise Recommendation 3 to include leased property. This is a tool that helps us be more accountable to the project. It helps us manage the project.

The process owner has approved Recommendation 4. Target date for implementation is August 30, 2005. Cost on a $10 M project – 0 to $100,000. Time is a lot higher than 1%. Minimum time is 9 months plus development time. 0 to 12 months.
These time savings are not necessarily critical path.

Access Management Recommendation
Darlene Sharar
Handout: APDR

WSDOT should be delegated authority to approve the breaks listed in the handout.

Handout includes questions regarding defining the risks. None of the answers Darlene put in appear to create stumbling blocks.

Action Item: Darlene will fill out a recommendation request form and give it to Ken. This is Recommendation No. 5.

Assignments/Deliverables for Next Meeting
Ken Smith/Duncan Findlay

Revised Recommendation #3 – Keith Metcalf
Review Recommendation #5 – Darlene Sharar
Pinpoint next topic(s) to address
 Suggestion to discuss consultant agreements topic
  This isn't critical path
  This has gotten better
  Get an update from Doyle Dilley
 Suggestion to discuss #44 – Add resources to Real Estate Services
  Is there still perceived understaffing?
  Would more staff unclog some bottlenecks?
  This might give a huge return statewide.
  The courts have not been kind – putting a lot into condemnations.
 Line Item Contingencies – be more project specific.
  Can't move funds from one project to another.
  Do we inflate all items to include the risk?

Action Item: Team bring ideas for #44 to the next meeting.

There are 150 people on the North South Corridor wait list who want Eastern Region to buy property. We can't yet. If we could do early right off way acquisition, we could save a huge amount of money. At project time, they know they have us.